



Creating and Maintaining Position and Job Data

A position allows Cardinal to track organization values and reporting relationships independently of the employee in the position assigned by Cardinal. Position Data values include title, department, job code, location, and Reports To position number.

Personal Data includes biographical details for an employee, such as name and address. A person must have an organizational relationship established to identify the person as an employee and associate the job data information.

Job Data includes the organization details for an employee. Every employee has a position number assigned on job data. When a position is assigned to an employee on Job Data, Cardinal uses certain Position Data values to default organizational values on the employee's job record.

Most positions and new hires (including rehires and transfers from other agencies not previously in Cardinal) should be interfaced to Cardinal by the PMIS interface. However, you can enter a position or employee directly into Cardinal, if necessary.

This job aid provides the steps for entering a new hire online which will require:

- Adding a Position
- Adding a Person
- Adding Job Data

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Adding a Position in Cardinal

1. To add a new position, navigate to the **Add/Update Position** page using the following path:
Main Menu > Organization Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

2. On the **Add a New Value** tab:
 - a. Enter the position number in the **Position Number** field.
 - b. Click the **Add** button.



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Navigation: Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Tab: Description | **Specific Information** | Budget and Incumbents

Position Information Find | View All First 1 of 1 Last

Position Number 20007314
Headcount Status ***Effective Date** 01/23/2020
Reason NEW | New Position
Current Head Count 0 out of 0
*Status Active Initialize
*Position Status Approved Status Date 01/23/2020
Action Date 01/23/2020
Key Position

Job Information

*Business Unit 50100 VDOT Business Unit
Job Code 19034 Fin Svcs Mgr I
*Reg/Temp Regular
*Regular Shift Not Applicable
Title Fin Svcs Mgr I
*Full/Part Time Full-Time
Union Code
Short Title Fin Svcs Detailed Position Description

Work Location

*Reg Region USA United States
Department 10014 Financial Planning
Location 10 VDOT Central Office
Reports To 00003 Gen Admin Manager II
Company DOT Virginia Dept of Transportation
Supervisor Lvl
Dot-Line
Security Clearance

Salary Plan Information

Salary Admin Plan Grade Step
Standard Hours 40.00 Work Period W Weekly
Mon 8.00 Tue 8.00 Wed 8.00 Thu 8.00 Fri 8.00 Sat Sun
USA
FLSA Status Nonexempt
Bargaining Unit 8888
Updated on Updated By

Buttons: Save Notify Add Update/Display Include History Correct History

Footer: Description | Specific Information | Budget and Incumbents

3. The **Description** tab displays. Enter or select the appropriate values for the following fields:
 - a. **Effective Date**
 - b. **Job Code**
 - c. **Reg/Temp**
 - d. **Department**
 - e. **Reports To** position number
4. The **Standard Hours** field should only be updated if the position is part time. This is not the schedule being used for the position.
5. Click on the **USA flag** to open the **FLSA Status** field. This field defaults to **Non-Exempt**. If the position is exempt, select **Professional**.
6. Click the **Save** button to save the new position.



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Position Number 20007314
Headcount Status Current Head Count 0 out of 0

Specific Information Find | View All First 1 of 1 Last
Effective Date 01/23/2020 Status Active

Max Head Count 1

Mail Drop ID
Work Phone
Health Certificate
Signature Authority

Incumbents
☒ Update Incumbents
☐ Include Salary Plan/Grade
☐ Force Update for Title Changes
☒ Budgeted Position
☐ Confidential Position
☐ Job Sharing Permitted
☐ Available for Telework

Education and Government

Save Notify Add Update/Display Include History Correct History

7. Click the **Specific Information** tab. This tab contains two important fields:
 - a. **Max Head Count** – This field indicates the number of individuals that can be assigned to the position and can be adjusted as appropriate.
For agency **50100** (VDOT), this value should always be **1**.
 - b. **Update Incumbents** – This checkbox is checked once an employee is assigned to the position. Cardinal does not allow you to check this box until then.

Position Number 20007314
Headcount Status Current Head Count 0 out of 0

Current Budget

Head Count	Current Budget FTE	Amount
0	0.00	0.000

Current Incumbents Personalize | Find 1 of 1

Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
0			0.00		01/23/2020				Job Data

Save Notify Add Update/Display Include History Correct History

8. Click the **Budget and Incumbents** tab. For a new position, the **Current Incumbent** field displays as shown in the image above.
If there is an active employee in the position, the **Empl ID** and **Name** display, and the **Job Data** hyperlink is enabled to allow direct access to the incumbent's Job Data.
9. Click the **Save** button to save the position.



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Add a Person

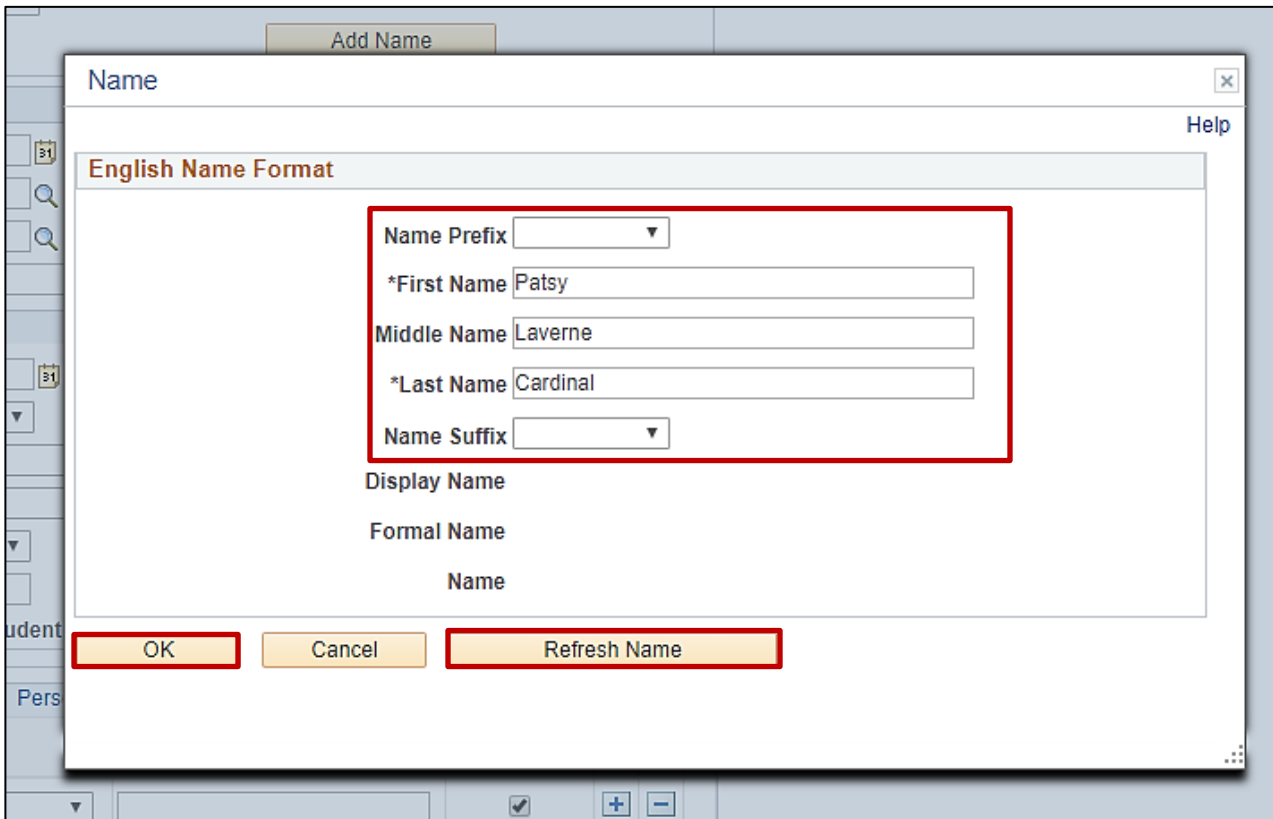
Once the position is complete, the next step is to add the person.

10. Navigate to the **Add a Person** page using the following path:

Main Menu > Workforce Administration > Personal Information > Add a Person

11. The **Add a Person** page displays. Enter the Employee ID in the **Person ID** field.
12. Click the **Add Person** button.

13. The **Biographical Details** tab displays. Enter or select the **Effective Date** for the employee you are adding. This field defaults to the current date and should be updated as appropriate.
14. Click the **Add Name** button.



15. The **Name** pop-up window displays. Enter the employee's full legal name:
 - a. **Name Prefix** – if applicable
 - b. **First Name**
 - c. **Middle Name**
 - d. **Last Name**
 - e. **Name Suffix** – if applicable
16. Click the **Refresh Name** button to confirm the name is correct. If not, you can make changes and click the **Refresh Name** button again.
17. Click the **OK** button.



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Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Biographical Details | **Contact Information** | Regional | Organizational Relationships

Patsy Cardinal Person ID 00123456700

Name Find | View All First 1 of 1 Last

*Effective Date 01/23/2020 + -

*Format Type English

Display Name Patsy Cardinal Edit Name

Biographic Information

Date of Birth Years 0 Months 0

Birth Country USA United States

Birth State

Birth Location ☐ Waive Data Protection

Biographical History Find | View All First 1 of 1 Last

*Effective Date 01/23/2020 + -

*Gender Unknown

*Highest Education Level Not Indicated

*Marital Status Unknown As of

Language Code

Alternate ID ☐ Full-Time Student

National ID Personalize | Find | View All | First 1 of 1 Last

*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number		<input checked="" type="checkbox"/>

Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships

18. The **Biographical Details** tab returns. The employee's first and last name now displays at the top corner of the tab.

No additional data entry is required on this tab.

Note: Do not enter the employee's Date of Birth or Social Security Number.

19. Click the **Contact Information** tab.



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Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Biographical Details | **Contact Information** | Regional | Organizational Relationships

Patsy Cardinal Empl ID 00123456700

Current Addresses Personalize | Find | View All | [Grid Icon] First 1 of 1 Last

Address Type	As Of Date	Status	Address	
Home	01/23/2020	A		Add Address Detail [+] [-]

Phone Information Personalize | Find | View All | [Grid Icon] First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred	
[Dropdown]	[Text]	[Text]	<input type="checkbox"/>	[+] [-]

Email Addresses Personalize | Find | View All | [Grid Icon] First 1 of 1 Last

*Email Type	*Email Address	Preferred	
[Dropdown]	[Text]	<input type="checkbox"/>	[+] [-]

Instant Message IDs [?] Personalize | Find | View All | [Grid Icon] First 1 of 1 Last

*IM Protocol	*IM Domain	*Network ID	Preferred	
[Dropdown]	[Text]	[Text]	<input type="checkbox"/>	[+] [-]

[Save] [Notify] [Refresh] [Add] [Update/Display] [Include History] [Correct History]

Biographical Details | Contact Information | Regional | Organizational Relationships

20. Click the **Add Address Detail** link.

Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Address History

Address Type Home

Address History Find First 1 of 1 Last

*Effective Date	01/23/2020 [Calendar Icon]	Address	[+] [-]
Country	USA [Search Icon]		
*Status	A [Search Icon]		
Add Address			

[OK] [Cancel] [Refresh]

21. The **Address History** page displays. Click the **Add Address** link.



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Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Edit Address

Country United States

Address 1 123 Cardinal Way

Address 2

Address 3

City Richmond State VA Virginia

Postal 23220

County

OK Cancel

22. The **Edit Address** page displays. Enter the home address of the employee.
23. Click the **OK** button.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Address History

Address Type Home

Address History Find First 1 of 1 Last

*Effective Date 01/23/2020 Country USA *Status A Address 123 Cardinal Way Richmond, VA 23220

Add Address

OK Cancel Refresh

24. The **Address History** page returns. The address that was entered displays.
25. Click the **OK** button.



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Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Biographical Details | Contact Information | Regional | **Organizational Relationships**

Patsy Cardinal Empl ID 00123456700

Current Addresses Personalize | Find | View All | [?] | [grid] First 1 of 1 Last

Address Type	As Of Date	Status	Address		
Home	01/23/2020	A	123 Cardinal Way Richmond, VA 23220	Edit/View Address Detail	+ -

Phone Information Personalize | Find | View All | [?] | [grid] First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred		
				+ -	

Email Addresses Personalize | Find | View All | [?] | [grid] First 1 of 1 Last

*Email Type	*Email Address	Preferred		
			+ -	

Instant Message IDs ? Personalize | Find | View All | [?] | [grid] First 1 of 1 Last

*IM Protocol	*IM Domain	*Network ID	Preferred		
				+ -	

Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships

26. The **Contact Information** tab returns. Click the **Organizational Relationships** tab.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Biographical Details | **Contact Information** | Regional | Organizational Relationships

Patsy Cardinal Person ID 00123456700

Choose Org Relationship to Add

☒ Employee
☐ Contingent Worker
☐ Person of Interest

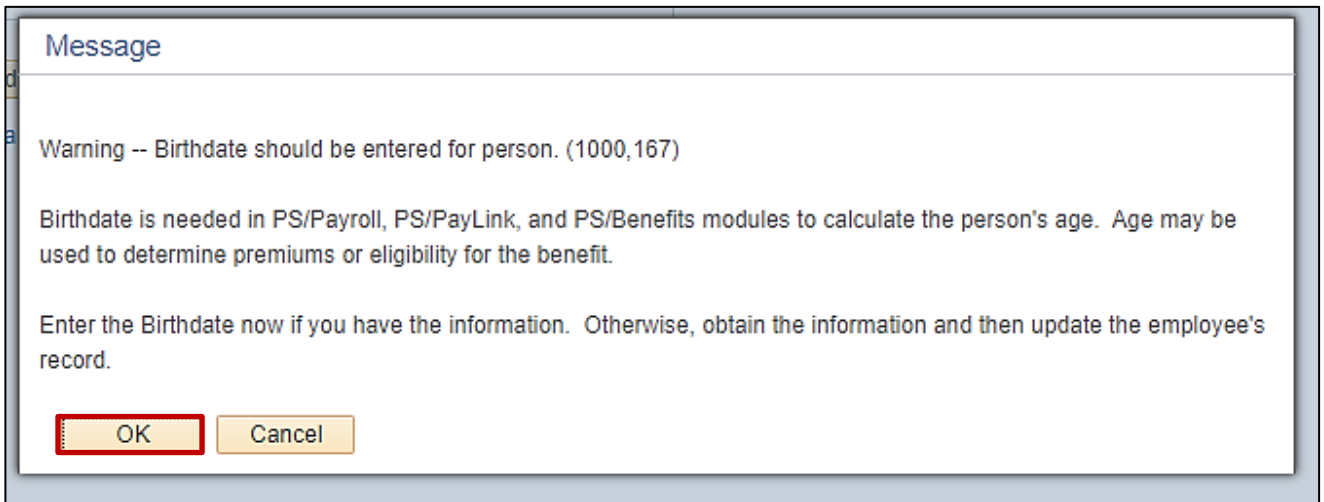
Empl Record 0

Add Relationship

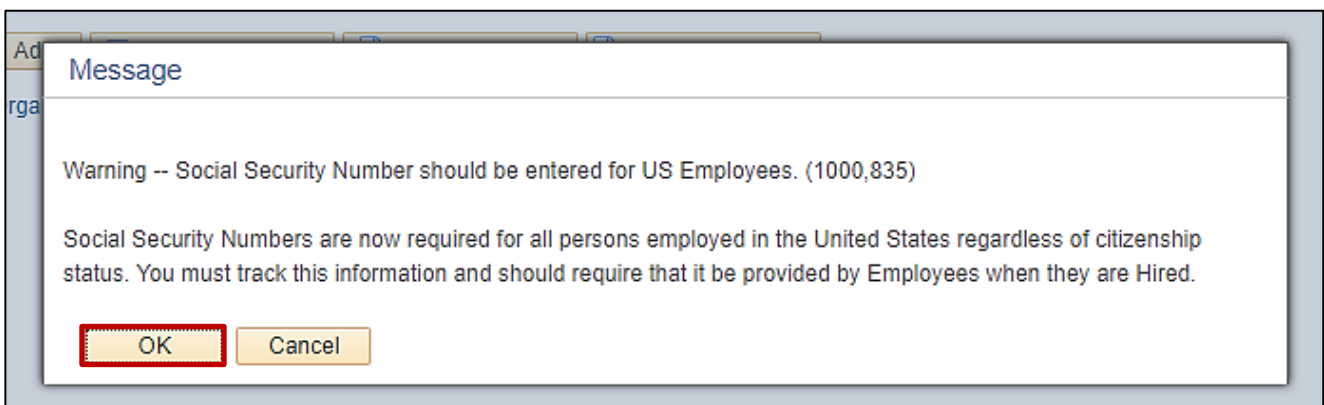
Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships

27. Click the **Employee** checkbox.
28. Click the **Add Relationship** button.

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29. A message displays regarding a missing birthdate. Click the **OK** button.



30. A second message displays related to Social Security Number. Click the **OK** button.



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Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Patsy Cardinal Employee Empl ID 00123456700 Empl Record 0

Work Location Details ? Find First 1 of 1 Last

*Effective Date 01/23/2020 Effective Sequence 0 HR Status Active Payroll Status Active

*Action Hire Reason First Job *Job Indicator Primary Job

Calculate Status and Dates

Position Number 20007314 Fin Svcs Mgr Override Position Data

Position Entry Date 01/23/2020 ☐ Position Management Record

Regulatory Region USA United States
Company DOT Virginia Dept of Transportatio
Business Unit 50100 VDOT Business Unit
Department 10014 Financial Planning
Department Entry Date 01/23/2020
Location 10 VDOT Central Office
Establishment ID VDOT Virginia DOT Date Created 01/23/2020

Last Start Date 01/23/2020
Expected Job End Date

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

31. The Job Data **Work Location** tab displays with the employee's name in the top left hand corner of the tab.
32. The **Effective Date** auto-populates from the personal data:
 - a. The **Action** defaults to **Hire**. Update as appropriate if this is not the correct value.
 - b. Select the **Reason**. For this scenario, the employee is new so **First Job** is selected.
 - c. Enter or select the position number in the **Position Number** field.
When you tab or click out of this field, the **Position Management Record** fields populate with the values from the position.
33. DO NOT click the **Override Position Data** button. This will keep future position data changes from updating job data.
34. Click the **Job Information** tab.



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Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Work Location Job Information Job Labor **Payroll** Salary Plan Compensation

Patsy Cardinal Empl ID 00123456700
Employee Empl Record 0

Job Information Details ? Find First 1 of 1 Last

Effective Date 01/23/2020 **Go To Row**
Effective Sequence 0 Action Hire
HR Status Active Reason First Job
Payroll Status Active Job Indicator Primary Job

Current

Job Code 19034 Fin Svcs Mgr I
Entry Date 01/23/2020
Supervisor Level
Reports To 00003 **Gen Admin Manager III 00228705500 JOHN DOE**
Regular/Temporary Regular Full/Part Full-Time
Empl Class *Officer Code
Regular Shift Not Applicable Shift Rate
Shift Factor

Standard Hours ?
Standard Hours 40.00 Work Period W Weekly
FTE 1.000000

Contract Number ?
Contract Number **Next Contract Number**
Contract Type

USA

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

35. Do not manually enter anything here.
36. The **Reports To** position number is populated from **Position Data**. The approver's title, name and employee ID display.

If the **Reports To** field does not display the supervisor position number, employee ID, and name, research as appropriate, to ensure the employee had an active supervisor.

If further action is needed, you can leave and come back to the **Job Data** pages later.
37. Click the **Payroll** tab.



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Navigation: Favorites > Main Menu > Workforce Administration > Personal Information > Add a Person > Modify a Person

Employee: Patsy Cardinal
Empl ID: 00123456700
Empl Record: 0

Payroll Information

Effective Date: 01/23/2020
Effective Sequence: 0
HR Status: Active
Payroll Status: Active

Action: Hire
Reason: First Job
Job Indicator: Primary Job

*Payroll System: Payroll for North America
Absence System: Absence Management

Payroll for North America

Pay Group: SMS Semi-Monthly Salaried
Employee Type: S Salaried
Tax Location Code: COVA00
GL Pay Type:
Combination Code:
Holiday Schedule: HOLSAL Sal.HolSch
FICA Status: Subject

Absence Management System

Pay Group: SEMIMNTHLY Semi-Monthly Salaried AM

Setting

☒ Use Pay Group Eligibility
☒ Use Pay Group Rate Type
☒ Use Pay Group As Of Date

Eligibility Group:
Exchange Rate Type:
Use Rate As Of:

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

38. **Absence System:**

- If you are entering a salaried employee, select **Absence Management**.
- If you are entering an hourly employee, leave as **Other**.

39. Select the appropriate values for:

- Pay Group:** Salaried – **SMS** or Hourly – **BWH**
- Employee Type:** Salaried - **S** or Hourly - **H**
- Tax Location Code:** enter or select the appropriate code
- Holiday Schedule:** Salaried – **HOLSAL** or Hourly- **HOLHR**

40. If the employee is VSDP (Virginia Sickness and Disability Program), no further action is necessary.

If the employees is not in the VSDP eligibility group:

- Uncheck the **Use Pay Group Eligibility** checkbox.
- Select the appropriate **Eligibility Group**.

Note: For this scenario, VSDP is correct, so no further action is required.



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41. Click the **Compensation** tab.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Work Location Job Information Job Labor Payroll Salary Plan **Compensation**

Patsy Cardinal Empl ID 00123456700
Employee Empl Record 0

Compensation Details ? Find First 1 of 1 Last
Go To Row

Effective Date 01/23/2020
Effective Sequence 0 Action Hire
HR Status Active Reason First Job
Payroll Status Active Job Indicator Primary Job

Current

Compensation Rate 35,000.000000 *Frequency A Annual

► Comparative Information ?

► Pay Rates ?

Default Pay Components Contract Change Prorate Option

Pay Components ? Personalize | Find | 1 of 1 Last

Amounts Controls Changes Conversion

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAANNL	0	35,000.000000	USD	A	

Calculate Compensation

Job Data Employment Data Earnings Distribution **Benefits Program Participation**

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

42. Select the **Rate Code**.
- NAANNL** – Salaried
 - NAHRLY** - Hourly
43. Enter the **Comp Rate** in the appropriate format:
- Salaried** – annual compensation rate
 - Hourly** – hourly compensation rate
44. Click the **Calculate Compensation** button to calculate the other rate formats.
45. Click the **Benefits Program Participation** link at the bottom of the page.



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Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Benefit Program Participation

Patsy Cardinal
Employee

Empl ID 00123456700
Empl Record 0

Benefit Status ⓘ Find First 1 of 1 Last

Benefit Record Number 0

Effective Date 01/23/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason First Job

Job Indicator Primary Job

Current

*Benefits System Base Benefits

Annual Benefits Base Rate USD

Benefits Employee Status Active

Benefits Administration Eligibility ⓘ

BAS Group ID

Elig Fld 1

Elig Fld 2

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

Benefit Program Participation Details ⓘ Find | View All First 1 of 1 Last

*Effective Date 01/23/2020

*Benefit Program PSX

Currency Code USD

Sys delivered empty Ben Pgm

Job Data **Employment Data** Earnings Distribution Benefits Program Participation

OK Cancel Apply

46. The **Effective Date** field defaults with the current date. This should be the same as the hire date so update as appropriate.
47. Select **Benefit Program** option (**PSX**).
48. Click the **Employment Data** link.



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Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Employment Information

Patsy Cardinal
Employee

Empl ID 00123456700
Empl Record 0

Organizational Instance ?

Organizational Instance Rcd 0	Original Start Date 01/23/2020	<input type="checkbox"/> Override
Last Start Date	First Start Date	
Termination Date	Years Months Days	
Org Instance Service Date 01/23/2020	<input type="checkbox"/> Override	0 0 0

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date 01/23/2020	First Assignment Start 01/23/2020	
Assignment End Date		
Home/Host Classification Home	Years Months Days	Time Reporter Data
Company Seniority Date 01/23/2020	<input checked="" type="checkbox"/> Override	0 0 0
Benefits Service Date 01/23/2020	<input type="checkbox"/> Override	0 0 0
Seniority Pay Calc Date 01/23/2020	<input type="checkbox"/> Override	0 0 0
Probation Date <input type="text"/>		
Professional Experience Date <input type="text"/>	Last Verification Date <input type="text"/>	
Business Title Fin Svcs Mgr I	Position Phone	

USA

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply

49. The **Employment Information** tab displays. The **Company Seniority Date** defaults to the hire date, but can be updated if the employee has credit for the prior years of service.

To override the **Company Seniority Date**, check the **Override** checkbox next to the field and enter the appropriate date as indicated by HR (calculated based on various PMIS fields).

50. Click the **OK** button to save all the Job Data information.

Message

Warning -- You have updated job information that is relevant to compensation defaulting on job row 1. (1000,910)

You have updated job information that is relevant to compensation defaulting without updating the employee's compensation. If you would like to update the employee's compensation now based on the new information, then go to the Compensation page. You can select the Compensation Defaulting button in order to re-default any defaulted pay components. You can also manually adjust the pay components.

OK Cancel

51. A warning message like the one above displays.
52. Click the **OK** button.



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Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Tabs: Biographical Details | Contact Information | Regional | **Organizational Relationships**

Patsy Cardinal Person ID 00123456700

Choose Org Relationship to Add

☒ Employee
☐ Contingent Worker
☐ Person of Interest

Empl Record 0

Add Relationship

Buttons: Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships

53. Cardinal opens the **Organizational Relationships** tab. The employee has been successfully added in Cardinal.



Verify Employee Information

The next step is to check the Position to verify the employee is assigned to it and that the incumbent checkbox is checked.

54. Navigate to the **Add/Update Position Info** page using the following path:

Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

55. On the **Find an Existing Value** tab, enter the position number in the **Position Number** field.

56. Click the **Search** button.



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Navigation: Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Tab: Description | Specific Information | **Budget and Incumbents**

Position Information

Position Number 20007314
Headcount Status Filled
*Effective Date 01/23/2020
Reason NEW
*Position Status Approved
Current Head Count 1 out of 1
*Status Active
Action Date 01/23/2020
Status Date 01/23/2020
Key Position

Job Information

*Business Unit 50100 VDOT Business Unit
Job Code 19034 Fin Svcs Mgr I
*Reg/Temp Regular
*Regular Shift Not Applicable
Title Fin Svcs Mgr I
*Full/Part Time Full-Time
Union Code
Short Title Fin Svcs
Detailed Position Description

Work Location

*Reg Region USA United States
Department 10014 Financial Planning
Location 10 VDOT Central Office
Reports To 00003 Gen Admin Manager III
Supervisor Lvl
Company DOT Virginia Dept of Transportation
Dot-Line
Security Clearance

Salary Plan Information

Salary Admin Plan
Standard Hours 40.00
Grade
Step
Work Period W Weekly
Mon 8.00 Tue 8.00 Wed 8.00 Thu 8.00 Fri 8.00 Sat Sun

USA

Updated on 01/23/2020 7:24:04AM Updated By PPS1_ANGELA.GRAY

Buttons: Save Return to Search Notify Add Update/Display Include History **Correct History**

57. The **Description** tab displays. Review the information for accuracy.

If changes are required, click the **Correct History** button prior to making any changes.

58. Click the **Budget and Incumbents** tab.



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Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Description **Specific Information** Budget and Incumbents

Position Number 20007314
Headcount Status Filled Current Head Count 1 out of 1

Current Budget

Head Count	0	Current Budget FTE	0.00	Amount	0.000
------------	---	--------------------	------	--------	-------

Current Incumbents Personalize | Find | 1 of 1

Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
00123456700	0	Full-Time	40.00	Patsy Cardinal	01/23/2020	Hire	First Job	N	Job Data

Save Return to Search Notify Add Update/Display Include History Correct History

Description | Specific Information | Budget and Incumbents

59. Confirm the employee you added is in the position.

60. Click the **Specific Information** tab.

Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Description **Specific Information** Budget and Incumbents

Position Number 20007314
Headcount Status Filled Current Head Count 1 out of 1

Specific Information Find | View All First 1 of 1 Last

Effective Date 01/23/2020 Status Active

Max Head Count 1

Mail Drop ID

Work Phone

Health Certificate

Signature Authority

Incumbents

- ☒ Update Incumbents
- ☐ Include Salary Plan/Grade
- ☐ Force Update for Title Changes
- ☒ Budgeted Position
- ☐ Confidential Position
- ☐ Job Sharing Permitted
- ☐ Available for Telework

Education and Government

Save Return to Search Notify Add Update/Display Include History **Correct History**

Description | Specific Information | Budget and Incumbents

61. Click the **Correct History** button (if it was not clicked previously).

The Correct History button is grayed out once it has been selected.

62. Click the **Update Incumbents** checkbox.

63. Click the **Save** button.



Maintaining Reports To Approvers

Most position data is entered in PMIS and then interfaced into Cardinal. While the **Reports To** field information exists in PMIS, the interface does not currently update in Cardinal, so it must be entered and maintained manually in Cardinal. The **Reports To** Position Number cannot be entered until the Position is created in Cardinal.

1. To review/update the **Reports To** for an employee, navigate to the **Description** tab using the following path:

Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

The screenshot shows the 'Add/Update Position Info' form. At the top, there is a breadcrumb trail: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. Below this, the title 'Add/Update Position Info' is displayed. A message states: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Under the 'Find an Existing Value' tab, there is a 'Search Criteria' section. It contains several fields: 'Position Number' (beginning with '2001234'), 'Description' (beginning with), 'Position Status' (equals), 'Business Unit' (beginning with), 'Department' (beginning with), 'Job Code' (beginning with), and 'Reports To Position Number' (beginning with). Each field has a dropdown menu and a search icon. Below these fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and a 'Save Search Criteria' button. The breadcrumb trail is repeated at the bottom of the form.

2. On the **Find an Existing Value** tab, enter the position number in the **Position Number** field.
3. Click the **Search** button.



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Navigation: Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Position Information

Position Number: 2001234
Headcount Status: Filled
Current Head Count: 1 out of 1
*Effective Date: 09/01/2019
Reason: NEW
*Status: Active
Action Date: 01/23/2020
*Position Status: Approved
Status Date: 09/01/2019
Key Position: ☐

Job Information

*Business Unit: 50100 VDOT Business Unit
Job Code: 19012 Admin & Office Specialist II
*Reg/Temp: Regular
*Full/Part Time: Full-Time
*Regular Shift: Not Applicable
Union Code:
Title: Admin & Office Specialist II
Short Title: Admin & Of
Detailed Position Description

Work Location

*Reg Region: USA United States
Department: 10015 Fiscal
Company: DOT Virginia Dept of Transportatio
Location: 10 VDOT Central Office
Reports To: 00156 Financial Services Manager I
Dot-Line:
Supervisor Lvl:
Security Clearance:

Salary Plan Information

Salary Admin Plan:
Grade:
Step:
Standard Hours: 40.00
Work Period: W Weekly
Mon: 8.00 Tue: 8.00 Wed: 8.00 Thu: 8.00 Fri: 8.00 Sat: Sun:
USA
Updated on: 01/23/2020 2:04:28PM
Updated By: PPS1_ANGELA.GRAY

Buttons: Save Return to Search Notify Add Update/Display Include History Correct History

4. The **Description** tab displays.



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Navigation: Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Position Information

Position Number 2001234
Headcount Status Filled
Current Head Count 1 out of 1
*Effective Date 09/01/2019
Reason NEW New Position
*Status Active
*Position Status Approved Status Date 09/01/2019
Action Date 01/23/2020
Key Position

Job Information

*Business Unit 50100 VDOT Business Unit
Job Code 19012 Admin & Office Specialist II
*Reg/Temp Regular
*Full/Part Time Full-Time
*Regular Shift Not Applicable
Union Code
Title Admin & Office Specialist II
Short Title Admin & Of Detailed Position Description

Work Location

*Reg Region USA United States
Department 10015 Fiscal
Company DOT Virginia Dept of Transportatio
Location 10 VDOT Central Office
Reports To 00243 Financial Services Spec II
Supervisor Lvl
Dot-Line
Security Clearance

Salary Plan Information

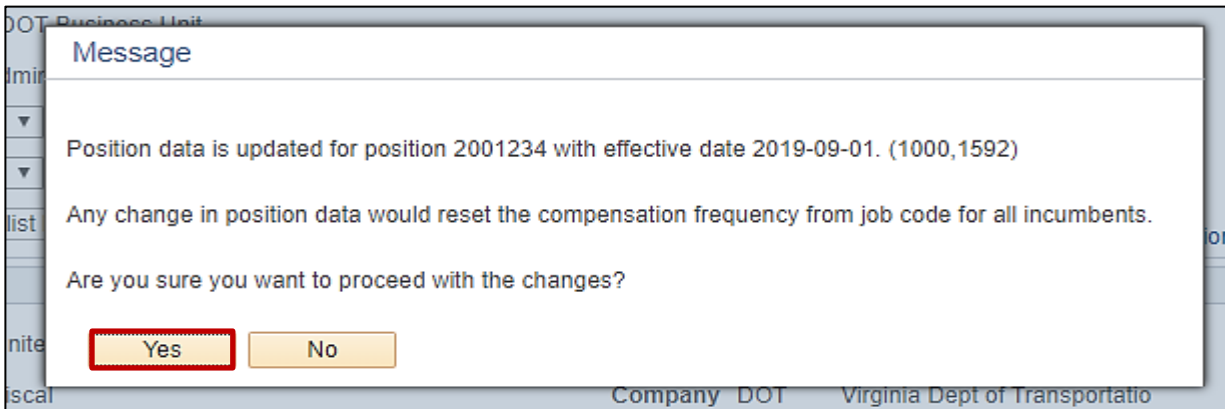
Salary Admin Plan Grade Step
Standard Hours 40.00 Work Period W Weekly
Mon 8.00 Tue 8.00 Wed 8.00 Thu 8.00 Fri 8.00 Sat Sun

USA

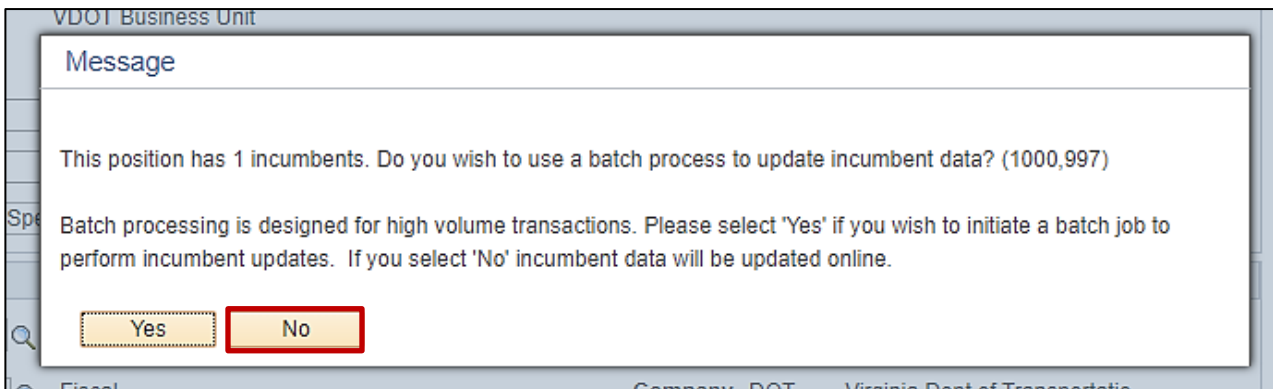
Updated on 01/23/2020 2:13:28PM Updated By PPS1_ANGELA.GRAY

Buttons: Save Return to Search Notify Add Update/Display Include History Correct History

5. Click the **Correct History** button.
6. Update the **Reports To** field with the appropriate value.
7. Click the **Save** button.



8. A message displays asking if you to proceed with the change since it would reset the compensation frequency from job code for all incumbents. Are you sure you want to proceed with the changes?
9. Click the **Yes** button to continue.



10. A message displays asking if a batch process to update incumbent data is needed. Click the **No** button, which means the incumbent's Job Data will be updated online.
11. Navigate to the employee **Job Data** to ensure the **Reports To** position number is updated on the **Job Information** page. This includes the supervisor ID and name is displayed.

Navigate to the **Job Data** page using the following path:

Main Menu > Workforce Administration > Job Information > Job Data



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Navigation: Favorites ▾ | Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data

Job Data


Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

Empl ID	begins with ▾	00177728200
Empl Record	= ▾	
Name	begins with ▾	
Last Name	begins with ▾	
Second Last Name	begins with ▾	
Alternate Character Name	begins with ▾	
Middle Name	begins with ▾	

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

12. Enter the employee ID in the **Empl ID** field.
13. Click the **Search** button.



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Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data

Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Lamont Person Empl ID 00177728200
Employee Empl Record 0

Job Information Details (?) Find First 1 of 2 Last

Effective Date 09/01/2019 Go To Row
Effective Sequence 1 Action Position Change
HR Status Active Reason New Position
Payroll Status Active Job Indicator Primary Job Current

Job Code 19012 Admin & Office Specialist II
Entry Date 09/01/2019
Supervisor Level
Reports To 00243 Financial Services Spec II 00388476400 Sally Smith
Regular/Temporary Regular Full/Part Full-Time
Empl Class *Officer Code
Regular Shift Not Applicable Shift Rate
Shift Factor

Standard Hours (?)

Standard Hours	40.00	Work Period	W	Weekly
FTE	1.000000			

Contract Number (?)

Contract Number Next Contract Number
Contract Type

USA

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

14. The **Work Location** tab displays. Click the **Job Information** tab.
15. View the **Reports To** information to verify it is accurate based on the change that was made.